

MICE market monitor 2012 – executive summary – preliminary version

9th consecutive survey on the German-speaking MICE markets and first time on Pan-European markets: Market developments, destination trends and use of social media

Overall scenario of outbound MICE markets in European countries – experts involved in organizing international corporate events have contributed to the survey to give insights about the industry.

The mmm-MICE market monitor, in its 9th edition, is an annual survey conducted by tmf dialogue marketing. The study enables to understand the ongoing and upcoming trends in German-speaking MICE markets. For the first time ever, the study also covers Pan-European markets. Due to its wide scope, the study gives insights about growth and development of the outbound meetings and incentives business of European MICE agencies and corporate planners. The survey results will benefit tourist boards, convention bureaus, hotels and other suppliers of MICE related services and products in designing their marketing, branding, and CRM strategies. Survey findings are presented in the format of simple charts followed by detailed interpretations hence, making it easy to read and actionable. The results are analysed and presented based on parameters like country of respondents (German vs. Austria/Switzerland), types of industry (MICE agencies vs. corporate planners), etc.

At an overall level, 342 MICE agencies and corporate planners participated in the 2012 survey in the German-speaking market. The Pan-European market is represented by 78 planners. The proportion of MICE agencies to corporate planners in the German-speaking market is about 2:1 which is similar to previous years.

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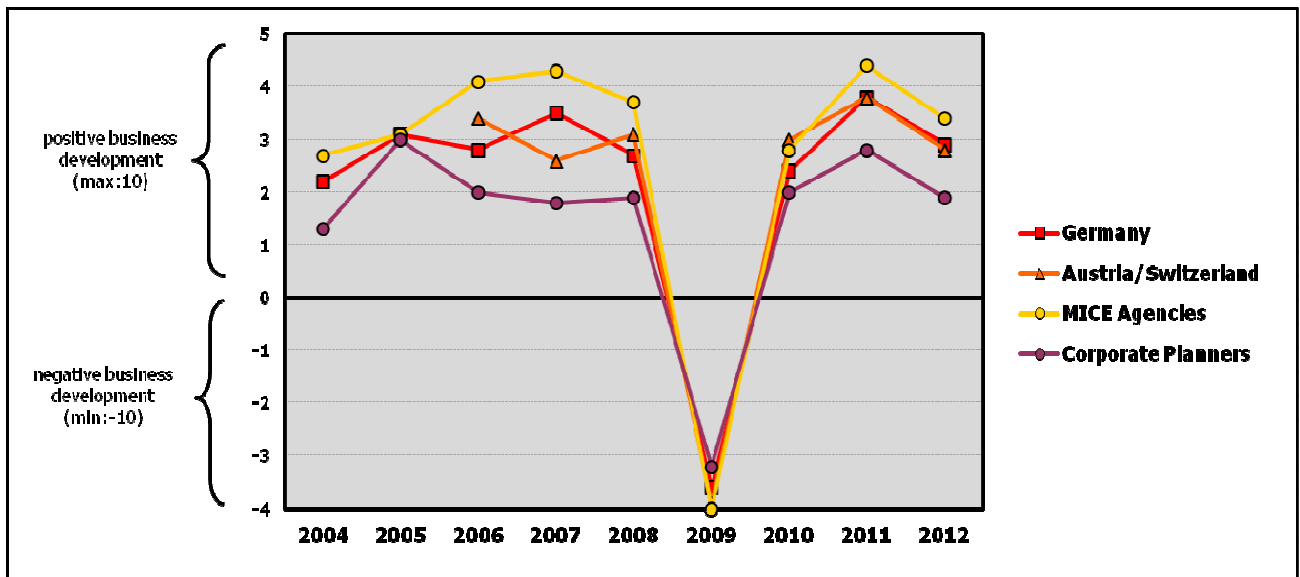
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The 2012 mmm focusses on:

- Benchmark business developments with previous years
- Projected demand for corporate events in 2012
- Demand for European and international destinations
- Rankings of destinations
- Social media as a tool for business and research requirements
- Social media channels used
- Obstacles against the use of social media in business
- Expected growth in the use of social media

Index "Current Business Development for the German-speaking market"

("How many conferences and meetings /incentives will you carry out this year in comparison to last year?")



The indices in general show a decrease when compared with the previous year, however are slightly better than 2010. MICE agencies are more positive with regards to the business development in 2012 when compared with corporate planners.

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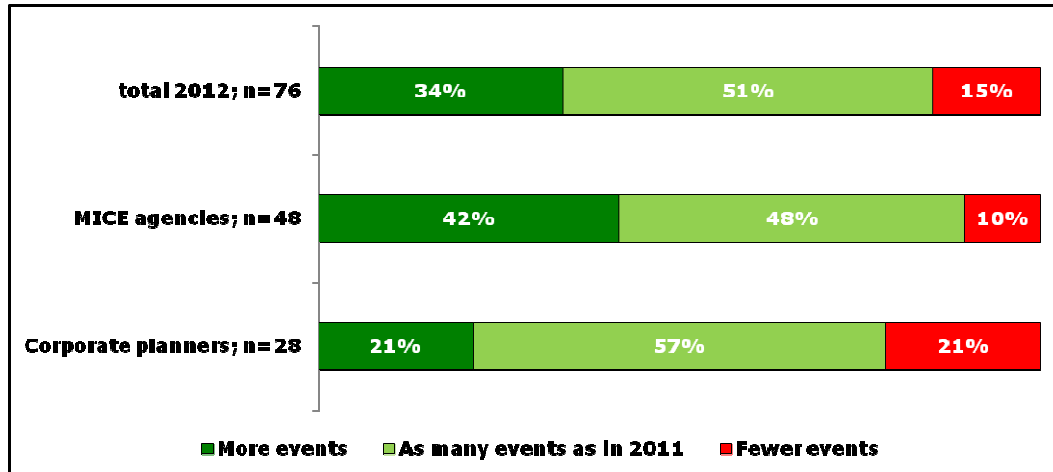
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"Current Business Development for Pan-European markets"

("How many conferences and meetings /incentives will you carry out this year in comparison to last year?")



Pan-European markets register positive outlook towards the meetings and incentives business with about one thirds expecting more events in 2012. As seen for the German-speaking market also, MICE agencies evaluate the current situation more positive than the Corporate Planners.

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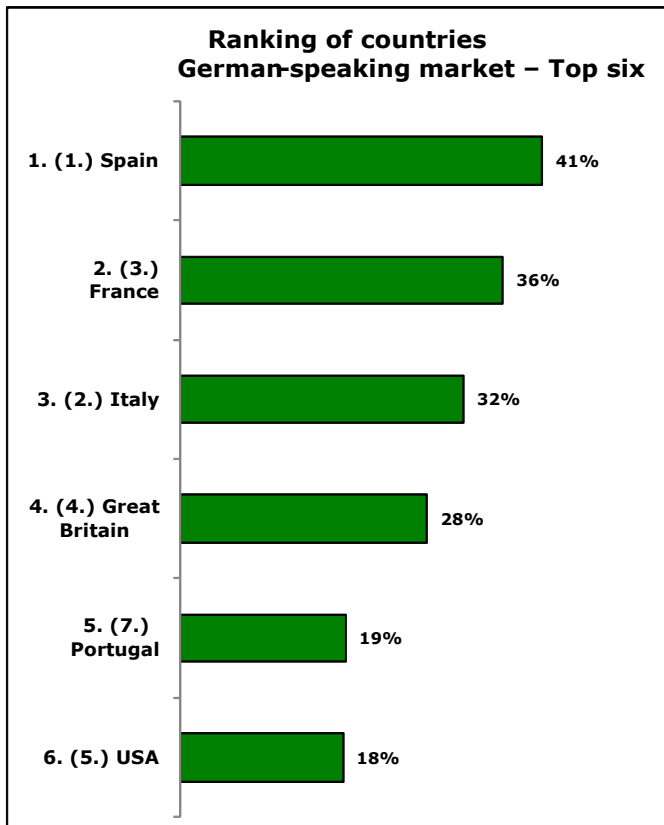
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"Ranking of favorite destinations in 2012 – German-speaking market"

("In which of the following countries do you plan to organize corporate events during the next 12 months?")



2012; n=316; ranks of 2011 in brackets

Spain, France and Italy are the top three destinations – Southern European destinations are again on top

Spain continues to hold the first position as in the last consecutive years with 41%. France and Italy have swapped their rankings. France is at second position with 36% and Italy now moved to the third position with 32%. Also of importance are Great Britain, Portugal, USA and the Netherlands.

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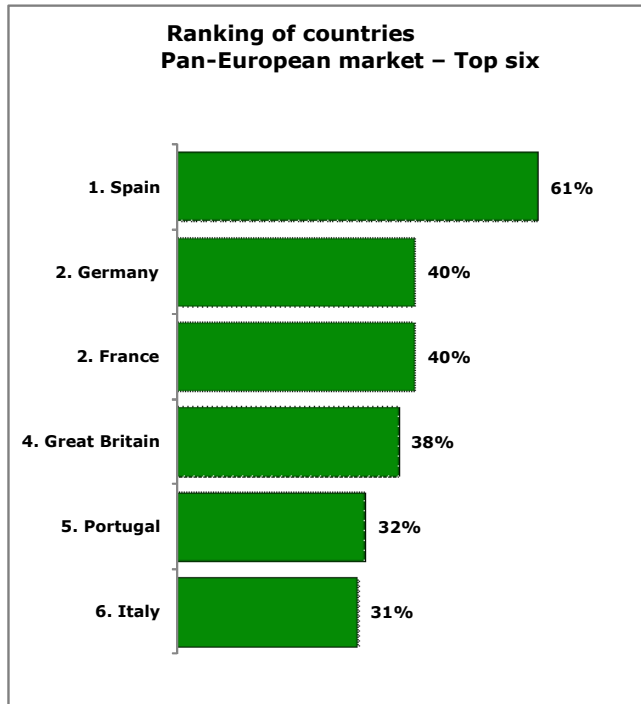
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"Ranking of favorite destinations in 2012 – Pan-European markets"

("In which of the following countries do you plan to organize corporate events during the next 12 months?")



2012; n=72

Similar to the German-speaking market, Spain captures the first rank with 61% of the respondents saying so. Germany and France are at the second rank, closely followed by Great Britain. Of the top 20 ranked preferred destinations (23 countries), most them are European.

"Social media for research and business networking"

Social media is an important tool for research and business related work for both German-speaking and Pan-European organizers. The use of social media is slightly more in Pan-European markets as against in the German-speaking market. In-line with this trend, the

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increase in the usage of social media is higher among Pan-European organizers. In both markets, MICE agencies are more active on social media vis-à-vis corporate planners.

Conclusions

After a strong recovery of the MICE market in 2011, the German-speaking market prospects continuous growth for 2012 as well, however the outlook shows a slight decline in the expected business in 2012 in comparison to 2011. The Pan-European market also confirms a positive development of the current business situation.

In order to keep up with the increasing competition, changing business situations and varied demands from the customers, suppliers have to work towards improvements on a regular basis.

The insights of this report enable to design marketing, PR and CRM strategies. The future of destination marketing and PR lies in the application of both traditional and online tools.

The management and handling of a growing number of social media channels represents a big challenge for service suppliers and people engaged in PR and marketing.

tmf dialogue marketing matches new content marketing services with excellent personal contacts in key markets through a sophisticated mix of live communication, media and PR work, market research, lead generation and sales support and state-of-the-art Web 2.0 social media marketing solutions.

tmf dialogue marketing is encouraging all leading destinations and suppliers to engage themselves in this research by becoming sponsors and an integral partner of the project, adding expertise to our discussions, so we jointly will be able to get the full picture of new aspects and future tasks to comply with in this challenging marketplace. The unique expertise of this research will help achieving goals.

The full report can be ordered via the order form at www.tmf-dialogue.com.

tmf dialogue marketing

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